Primary Insurance

Entering Primary Payer Information at the Line Level through the Web Portal
Primary Insurance – Web Portal

When manually entering a new claim via web portal and Commercial Insurance is the primary payer, in addition to the usual information required on a claim a provider should:

**Step 1:** Navigate to the Basic Claim Info tab. Notice the default selection for Void/Replacement is No. Keep the default selection.
Step 2: Scroll down to the Member Information section
- Under **Other Insurance Information**, select **Yes**.

**IMPORTANT NOTE:** A link to help you complete Step 4 appears immediately under the button after you select Yes. Click on the hyperlink or navigate to the Other Claim Info tab.
Step 3: Navigate to the Other Claim Info tab
Step 4: Scroll down to the Coordination of Benefits section
   • Under “Other Insurance” click the button labeled Add Other Insurance (that expands a subsection labeled New Other Insurance)

IMPORTANT NOTE: If Steps 1-3 were not performed, the system reminds you to go back and perform Steps 1-3 before continuing.
Step 5: In the subsection labeled New Other Insurance, notice the panel for Other Subscriber is already expanded

- In the field for **Entity Qualifier** select **Person** or **Non–person entity** from the dropdown menu
- In the field for **Subscriber ID** enter the member’s ID number
- In the field for **Last Name** enter the member’s last name
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Scroll down and expand the panel for Other Subscriber Information

- In the field for **Relation to Individual** select **Self** from the dropdown menu if the insurance holder is the member
- In the field for **Claim Filing Code**, for a nursing home policy select **Commercial Insurance Co.** from the dropdown menu
- In the field for **Payer Responsibility Seq # Code** select **Primary** if Commercial Insurance is the primary payer
- Fill in any other fields in this panel which are relevant to the claim
Step 6: Scroll down and notice the panel for Other Insurance Coverage is already expanded

- In the field for **Release of Information Code**, select the appropriate value from the dropdown menu
Step 7: Scroll down and notice the panel for Other Payer Information - including Medicare Part A or Part B is already expanded

- In the field for **Payer/Carrier ID Qualifier**, select **Payer Identification** from the dropdown menu
- In the field for **Payer/Carrier ID**, enter the Payer/Carrier ID for the commercial insurance company
- In the field for **Payer/Insurance Organization Name**, enter the name of the commercial insurance company
Step 8: Scroll up to the top of the New Other Insurance subsection and click the **Save** link in the upper right corner.
• Look for the Success message in red text, and notice the new line in the table of Other Insurance.
Step 9: Click the **Save Claim** button to determine if exceptions will be found for the claim in its current condition.
**Step 10:** Navigate to the Basic Claim Info tab and then scroll to the table of Basic Line Item Information at the bottom of the web page

- Notice the panel for New Line Item is already expanded below the table
Key in appropriate claim information for required fields
For the question **Is there additional line-specific information/TPL to be entered?** click the **Yes** radio button
Click the **Save & Add Other Svc Info/TPL** link in the upper right corner of the panel; that navigates to a page for supplying Other Service Information

Look for the Success message in red text, and notice line # 1
Step 11: Scroll down to the bottom of the page and click the button labeled **Add Other Payer Service Information**; the panel for Service Line Adjudication automatically expands

- The **Sequence Number** field is automatically populated with “1”
- If there are multiple other insurances identified in the claim’s header, select the appropriate **Other Payer Primary ID** from the dropdown menu in this field (for this line level)
- In the **Service Amount Paid Amount** field enter the amount the other payer paid at line level
- In the **Adjudication or Pay Date** field enter the other payer’s paid date
• In the **Paid Service Unit Count** field enter how many units the other Payer paid for

• In the **Procedure Qualifier** field select an appropriate value from the dropdown menu

• In the **Procedure Code** field enter an appropriate code if required

• Add a Procedure Code Description, Bundled Line Number, and Procedure Code Modifiers if appropriate

• In the **Revenue Code** field enter the appropriate revenue code
**Step 12:** If the claim needs to include any deductible and coinsurance information, expand the **Service Adjustment** panel

- Click the button labeled **Add Line Level Adjustments** to display the panel for New Line Level Adjustments
In the field **Claim Adjustment Group Code**, select the appropriate value from the dropdown menu, for example, “Patient Responsibility”

- Enter **Reason Code** = 1
- Enter **Amount** = billed amount less the other payer payment
- Enter **Quantity** = number of units the other payer paid
- Click the **Save** link in the upper right corner of the panel
- Notice the new line in the table of Line level Adjustments

<table>
<thead>
<tr>
<th>Claim Adjustment Group Code</th>
<th>Reason Code</th>
<th>Amount</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient Responsibility</td>
<td>1</td>
<td>$7,641.81</td>
<td></td>
</tr>
</tbody>
</table>
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**Step 13:** Scroll up and click the **Save** link in the upper right corner of the New Other Payer Service Information section

- Notice the new line in the table of Other Payer Service Information and Success message
- Repeat Steps 3 & 4 as needed to add more Line Level items
Step 14: Click the **Save & Return to Basic Service Line Item** button to save the detail line.

Step 15: Click the **Save** on the detail line.

Step 16: Click the **Save Claim** button to determine if exceptions will be found for the claim in its current condition. Fix any exceptions.
Step 17: Click **Submit Claim**; the claim begins the adjudication process immediately.
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- Note the success message and the claim’s TCN number
- Print the confirmation page for your records

**IMPORTANT NOTE**: This may not be the actual amount. Refer to the Remittance Advice (RA) for detailed payment information.